

EndNote 9 Class Outline

1 Introductions and Overview

1.1 Introductions

1.2 Functions of EndNote

1.2.1 *Bibliography Creation*

EndNote works with your word processor to create formatted bibliographies.

1.2.2 *Reference Organization*

EndNote is a database program to track your references.

1.2.3 *Connectivity with the Online World*

Internet Search allows you to search online databases from within EndNote.

Direct Export downloads references directly from online databases into EndNote.

Importing Text Files allows importing of text files saved from online database searches.

1.3 EndNote Requirements

1.3.1 *Windows*

- Windows 2000 or XP
- 450 MHz or higher Pentium-class CPU
- 128 MB of RAM
- 180 MB of free disk space

1.3.2 *Macintosh*

- OS 10.2.x or 10.3.x
- Power Mac G4 or better
- 128 MB of RAM
- 180 MB of free disk space

1.4 Word Processor Compatibility

1.4.1 *Windows*

- Microsoft Word 2000/XP (2002)/2003
- Any word processor capable of producing rich text format (RTF) documents

1.4.2 *Macintosh*

- Microsoft Word X and 2004
- Any word processor capable of producing rich text format (RTF) documents

1.5 General “Statistics”

- Allows creation of an unlimited number of personal databases (generally called “libraries” in EndNote)
- Windows and Macintosh libraries are compatible
- Allows an unlimited number of libraries to be open at one time

- Each library can contain an unlimited number of references
- Each record can contain up to 52 fields (e.g., Author, Title, etc.)
- Ships with 35 predefined reference types and 3 unused reference types that can be customized to meet your needs

1.6 After the Class

1.6.1 The EndNote Guided Tour

You can use the EndNote Guided Tour to practice what you have learned. The Guided Tour can be found in Chapter 3 of your EndNote manual and is also available in a PDF file that is included with the trial version of EndNote.

1.6.2 Technical Support

Technical Support is free and is available Monday–Friday, 8 a.m. to 5 p.m., Pacific time. You can reach technical support using the *Contact Us* area of our web site or at 408-987-5609.

2 Creating and Adding Records to an EndNote Library

2.1 The Paleo Library

The Paleo library is placed in the EndNote Examples folder during installation and is used in the exercises in the EndNote Guided Tour.

2.2 Customizing the EndNote Preferences

To edit the preferences, on Windows select **Preferences** from the **Edit** menu, on Macintosh select **Preferences** from the **EndNote** menu to the left of the File menu. _____

2.3 Creating a Library

Select **New** from the **File** menu. You can place your EndNote libraries anywhere you choose on your hard drive or network. _____

2.4 Manually Entering References

Select **New Reference** from the **References** menu to create a new record. _____

2.4.1 Selecting the Reference Type

Select the reference type from the pull-down **Reference Type** list at the top of the empty record.

2.4.2 Entering Data

Do not format the data as you enter it if the formatting would apply to the entire field. For example, do not italicize or bold author names or journal names. If formatting applies to only some words or characters in a field, then you can apply that special formatting using the formatting toolbar.

You do not need to enter data in every field. Enter the data that you require for your bibliography or that you wish to track.

2.4.3 Special Fields

Authors: Author names can be entered either given name and then last name (e.g., John Robert Smith) or last name, then a comma, then the given name (e.g., Smith, John Robert). Each author must be on a separate line. Add corporate authors with a comma at the end of their name (e.g., University of California,). If you use a name that has been used before in the library, EndNote will automatically enter it for you.

Year: This is not a true date field. It is an alphanumeric sorting field. Enter four-digit years. You can also enter text such as “unpublished” or “in press.”

Journal: EndNote will automatically enter a journal name that matches your typing. When what you are typing no longer matches any journal previously used in the library, the name will turn red.

Pages: Pages can be entered as a full range of pages (e.g., 125-128) or as a truncated range (e.g., 125-8). EndNote is able to convert the format entered to the format required in the style.

Date: This is not a true date field. It is a text field and will be shown in your bibliography exactly as entered. Do not include the year here because if your style calls for date information, the year will be pulled from the year field.

Short Title: If a full-reference footnote style calls for a shortened version of the title in repeated citations, that information will be pulled from the short title field. This field is generally used only in the humanities.

Alternate Journal: This field is used for the abbreviation of the journal name. _____

Keywords: Enter keywords with a semicolon(;), a line break, or a backslash (\) between each keyword. _____

URL: You can copy and paste a URL into this field or type it in manually. _____

Link to PDF: You can insert links to files on your network or hard drive by selecting **Link to** from the **References** menu. Note that when you use this command it will always insert the link into the URL field. You can then cut the link from the URL field and paste it into a field of your choice, such as the Link to PDF field. _____

Image: This is another way of creating links to files. To insert a link to the image field for a picture file (a .bmp, .gif, or .jpg file), select **Insert Picture** from the **References** menu. To insert a link to the image field for file types that Microsoft Word will not accept as a picture, select **Insert Object** from the **References** menu. If the file inserted is a picture you will see a thumbnail image of the picture; if it is an object you will see an icon for the object's file type. There can be only one file linked to the image field per record. _____

Caption: This field is tied to the Image field. When the image is inserted into a Word document, the contents of the caption field will be used as the caption for the image in Word. _____

2.5 Online Connectivity—Importing References from Online Databases

2.5.1 Internet Search—Searching an Online Database from within EndNote

Select **Connect** from the **Tools** menu in EndNote, then select either the connection file you want to use from the favorites list or click on **Connect** on the right to bring up a list of all available connection files and select the database you want to search from the list. This will open a temporary EndNote library, and in front of it a search window. Note that this same search window will appear when searching within an EndNote library. _____

2.5.2 Direct Export

The exact method for using direct export will vary with the data provider you are using. Currently, the following data providers support direct export for at least some of their databases: Thomson Scientific (ISI), Oxford Press Journals, American Psychological Association, BioMedNet, BioMedCentral, Bausch & Lomb, BMJ, Buffalo University, EBSCO, EI Engineering, EMBASE, Los Alamos National Laboratory, Stanford University's Highwire Press, IEEE, JAMA, Karger Publishing, JSTOR, MicroPatent, NERAC, NISC, OCLC, OVID, PROQUEST, Elsevier, Science Magazine, and Teleded.

2.5.3 Importing a Text File Saved from an Online Database

All importing uses a pattern matching process where the pattern of the tags in the data is matched against the pattern of the tags in the import filter (the filter is also known as a "capture file"). It is very important that data be saved in the tagged format that matches the filter that will be used to import it. Below is an example of tagged text. The tags are on the left and the data follows them.

```
TI - The Scale and the Feather: A Suggested Evolution
AU - Rex, Tiberius
```

For specific information on how to save data for the database you are using consult the table titled *Output Formats and Corresponding Import Options*. This table is available in the EndNote Guided Tour and in the chapter titled *Importing Reference Data into EndNote* in the manual.

BREAK

3 Using EndNote in Microsoft Word

3.1 Installing the Cite While You Write Files

When you install EndNote it will automatically install two files in your Word Startup folder that allow EndNote and Word to communicate and enabling Cite While You Write (CWYW) in EndNote. You should then see an EndNote menu under your Word Tools menu. You may also see an EndNote toolbar in Word. If you do not see the toolbar, select **Toolbars>EndNote** from the **View** menu in Word to make it visible.

3.2 Using the Cite While You Write Toolbar

3.2.1 Find Citation

This command will provide a search window where you can enter text that is in any field. You can then select references from a list of those that contain your search terms and insert them into your paper.

3.2.2 Go to EndNote

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document.

3.2.3 Format Bibliography

This command will allow you to change the EndNote style used for your document. It will also let you make other changes to the layout of your bibliography, such as adding titles and changing the line spacing.

3.2.4 Insert Selected Citation

This command will insert the references you selected in EndNote into your document at the location of the Word cursor.

3.2.5 **Edit Citation(s)**

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations. _____

3.2.6 **Insert Notes**

This command is rarely used except by *Science* magazine. *Science* requires that explanatory notes be numbered as though they were bibliography entries, and then placed in the bibliography. This command will allow you to do this. _____

3.2.7 **Edit Library Reference(s)**

This command will not by itself make any changes to your library references, so the name is a bit misleading. What this command will do is allow you to quickly access the specific record for any selected citation. _____

3.2.8 **Unformat Citation(s)**

This command will remove the formatted bibliography and citations and replace all citations with plain-text placeholders that EndNote can match to library records to create formatted citations. This command is commonly used when moving documents between word-processing programs. _____

3.2.9 **Remove Field Codes**

This command will create a second copy of the document with all EndNote field coding removed (you can generally recognize field codes such as formatted EndNote citations by their turning grey when you select them in Word). It is used when sending documents to a publisher because the field coding used for EndNote citations can sometimes cause problems for publishers' page layout programs. _____

3.2.10 **Export Traveling Library**

EndNote creates a hidden "traveling" library containing only the references used in each paper. This traveling library is part of the coded information contained in each citation. Use this command to export the references in this traveling library to a regular EndNote library. _____

3.2.11 **Insert Figure**

This command will provide a search window much like the Find Citation window where you can enter text that is in any field in the record you want to find. You can then select references from a list of those records with images attached that contain your search terms. A reference to the figure will be inserted at the location of your cursor. The image will be inserted either below the cursor location or in a list at the end of the document, depending on the selected EndNote style.

3.2.12 **Generate Figure List**

If you insert a new figure reference, all of the figures in the document will automatically be updated, but if you delete or move a figure reference you will need to force an update of the figure numbering and placement. Use the Generate Figure List command to do this. _____

3.2.13 **Cite While You Write Preferences**

Use this command to set preferences for EndNote's cite while you write settings for future documents. (Note: If you use Word as your e-mail editor in Microsoft Outlook, you should leave the *Open EndNote when Starting Word* option in the CWYW preferences unchecked.) _____

3.2.14 **Help**

This command will let you access contextual help for EndNote. _____

3.3 Using the EndNote Manuscript Templates for Word

EndNote ships with a number of Word templates for major journals. These templates include margins, font settings, headers, footers, and other formatting preset to the requirements of the journal. To access these templates, select **Manuscript Templates** from the **Tools** menu in EndNote. _____

4 Searching an EndNote Library

4.1 Building a Search Query

Select **Search References** from the **References** menu in EndNote. Note that EndNote “reads” search commands from top-to-bottom, so you want to start with commands that broaden your search (the OR command), then narrow your search using the AND and NOT commands.

4.2 Saving Search Queries to Use Again Later

Use the **Save Search** command in the search window to save search queries. Later you will be able to use the **Load Search** command to recall saved searches.

5 Subject Bibliography (Optional)

EndNote can create independent bibliographies organized by subheadings. These subheadings can be any EndNote field, including keywords or authors. To create a subject bibliography, select **Subject Bibliography** from the **Tools** menu in EndNote.

6 Data Visualization

This option will allow you to send the contents of an EndNote library to our companion program, RefViz. RefViz is a data visualization and text analysis tool capable of interacting with our bibliographic software programs.

7 EndNote on the Palm Pilot

If you have Palm software installed on your computer you should see a Configure Handheld Sync option available at the bottom of your Tools menu. This option will allow you to place a single EndNote library on your Palm Pilot.

8 Final Questions